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BA Insight

Customer Story

Maximizing productivity for Investment Banking analysts through AI Enablement.

BA Insight's AI Enablement Platform played a pivotal role during this Investment Bank's AI implementation project, helping them achieve success by indexing enterprise applications for Copilot ingestion while classifying, enriching, and augmenting their data to optimize the best outcomes. By partnering with BA Insight, the firm maximized their AI investment, providing their staff with better search functionality and a solid technological foundation to continue winning business.

The challenge: reliably connecting data across systems.

In the high-stakes world of investment banking, analysts are constantly under pressure to deliver accurate insights, build complex financial models, and meet tight deadlines. The sheer volume of repetitive tasks, data processing, and reporting often leaves little time for strategic decision-making and client engagement.

AI implementation wasn't impressing the team.

This leading global investment banking team had recently invested heavily in Microsoft's Copilot to aid in the development of research, analysis, and building models. Their goal was to revolutionize and operationalize the way their analysts and associates used AI in their workflows. However, even before implementation began, they struggled with a common challenge seen across industries: multiple data sources, business applications, and information spread across internal and external systems was complicating the implementation process before it really got off the ground. Additionally, knowledge already stored in their CRM, SQL databases, market intelligence tools, and other repositories weren't integrated effectively. That meant preparing for client engagements, drafting pitches, and other daily tasks required tedious manual work to extract and synthesize data from various sources into something cohesive and relevant to the case.

AI enablement changed the game.

This is where BA Insight's AI Enablement Platform came into play. The firm needed to enable Copilot to access knowledge from the rest of their business in a secure but impactful way, which meant extending Copilot's capabilities became the utmost priority.

With proper access, preparation, and exposure of knowledge, BA Insight's AI Enablement Platform provided the key steps to extend Copilot's capabilities past the walls of Microsoft into the repositories that analysts and associates used the most. By integrating advanced AI solutions into their workflows, investment banking analysts can now streamline mundane processes, focus on high-value activities, and significantly enhance their productivity. The platform plays a pivotal role in not only indexing enterprise applications for Copilot ingestion, but also for classifying, enriching, and augmenting their data to optimize the best possible outcomes with Copilot.

AI was actually making the workday more stressful for multitasking junior bankers.

AI enablement isn't just about automating tasks—it's about transforming how analysts work, empowering them to operate more efficiently in a fast-paced environment while delivering greater value to their organizations and clients.

Why take on the AI challenge?

Generally, investment bankers spend hours upon hours on repetitive low-value tasks like:

- Searching for and consolidating updates for clients

- Leveraging legacy systems to extract key deal insights

- Researching and identifying market trends to make financial projections more accurate

This fragmented workflow not only slows down deal velocity but increases the analysts' and associates' risk of missing critical insights that can be buried within siloed systems. Often when data is siloed, AI can't understand the contextualized story that is needed to provide an optimal outcome.

The need for AI enablement was real

Before reaching out to BA Insight, the firm hadn't achieved AI project success due to their knowledge mostly living outside of Microsoft 365. Their data wasn't clean or organized, and they had some issues on security retainment.

Before implementation even occurred, the team knew they faced this same common struggle: fragmented information across multiple systems, both internally and externally. Client information was stored in CRMs, financial models were in proprietary databases without integration, and market intelligence was isolated within different research tools.

Preparing for client meetings or drafting pitches required a highly manual process of extracting and synthesizing data from these disconnected sources, making it difficult to optimize for AI-driven insights.

It was time for an AI Enablement Platform.

Their busy team found success with AI enablement.

With BA Insight, the firm unlocked AI project success, empowering their bankers with dramatic efficiency and productivity gains.

The first priority was extending Copilot's capabilities to fulfill the requirements of the project. With proper access, preparation, and exposure of knowledge, BA Insight's AI Enablement Platform provided the key steps to extend Copilot's capabilities past the walls of Microsoft into the repositories that the firm's analysts and associates used daily to gather knowledge for client cases.

Implementation in action

One key use case for generative AI is for the preparation of client pitches, a process that previously required a significant investment in both time and resources.

With an enabled Copilot solution that is enriched, extended, and exposed, bankers are simplifying additional tasks such as:

- **Generated client briefings:** Stemming from a singular query with BA Insight, Copilot aggregates the latest updates from the CRM, pulling deal histories and relevant financial projections directly into PowerPoint, reducing bankers' manual efforts to build a presentation by 90%.

- **Streamlined deal analysis:** This firm's AI-enabled system delivers an easy process to surface key metrics and compare transaction data from historical archives, reducing the time spent searching, analyzing, and synthesizing spreadsheets, reports, and other documents to understand the viability of a deal.

More results to drive impact

- **Streamlined data retrieval and aggregation:** Associates and analysts reported significantly faster preparation times, allowing them to focus on engaging and chatting strategy with the client.

- **Improved deal outcomes:** Access to enriched, faster aggregated, and comprehensive data enabled more persuasive pitches and better-informed negotiations with potential clients.

- **Enhanced productivity:** By streamlining repetitive tasks, offloading analysis and visualization, and boosting research abilities, the firm had notable improvement in efficiency.

Protecting AI investments across the enterprise

Upland BA Insight's AI enablement platform allows enterprises to access, prepare, and expose the knowledge needed to power AI projects. BA Insight is AI agnostic; using vector search, data chunking, ML, NLP, and security trimming to index, enrich, and display knowledge from all connected sources to supercharge enterprise AI.